

Insurance added to list of services



Polson Higgs is pleased to announce the introduction of its new business providing full insurance services to its clients.

For Polson Higgs, it was important that we had people who were not only experienced but were also well qualified. The standard of advice delivered has to be of the highest professional quality. The new business has two professionals who give the sort of quality advice that we were looking for.

Lachie Gunn and Darryl Phipps are offering advice through Polson Higgs Insurance Services Limited. They have 35 years experience between them. They both hold the highest university qualifications available to financial advisers as well as each having the CFP (Certified Financial Planner) designation. Lachie also holds the CLU (Chartered Life Underwriter) designation, the highest university-based insurance-related qualification.

Lachie has been working closely with Polson Higgs clients for over 12 months and has assisted a number of clients with their personal and business insurances.

Polson Higgs Insurance Services Limited is a joint venture company between Polson

Sitting, from left: Steve Eves (Wealth Management), Darryl Phipps (Insurance Services).

Standing, from left: Frank Burgess (Partner), Phillip Roth (Partner), Bruce Allen (Business Services), Geoff Bolderston (Partner), Debbie Sherratt (Business Services), Lachie Gunn (Insurance Services).

Higgs Wealth Management and Lachie and Darryl's company, G5 Financial Services Limited.

Polson Higgs Insurance Services is now available to provide insurance advice and quotations for:

- Business insurances e.g. shareholder protection and key person.
- Personal insurances e.g. life, disability, trauma, income protection and medical.
- Group insurance and medical schemes for employees in small to large organisations.
- Commercial insurances - liability cover, asset protection, business interruption and other specialist commercial and business cover.

Contact your Polson Higgs business adviser for an introduction to Lachie or Darryl.

DIRECTORY OF SERVICES

The services offered by our divisions include:

Business Services

- > Annual and periodic financial statements
- > Taxation compliance
- > Advice re business sale and purchase
- > Business and strategic planning
- > Business and company valuations
- > Financial forecasts
- > Software installation and support
- > Business structuring advice

Audit/Assurance

- > External and internal audit
- > Review engagements
- > Corporate governance reviews
- > Internal controls/procedures reviews
- > Risk management
- > Forensic assignments

Taxation

- > Tax compliance and planning reviews
- > FBT/GST/ACC warrants of fitness
- > IRD tax audits and binding rulings
- > Tax advice on mergers and acquisitions
- > International tax advice
- > Training

Information Technology

- > Software development
- > IT assurance/IT warrant of fitness
- > Strategic IT advisory service
- > PC and network support
- > Package selection services
- > Project management

Wealth Management

- > Investment management advice and solutions
- > Personal and business insurances and advice
- > Employee benefits, advice and solutions
- > Comprehensive financial plans

Business Consulting Group

Human Resources

- > Executive recruitment
- > Strategic remuneration advice
- > Performance management
- > Psychometric assessment
- > Organisation reviews

Marketing

- > Strategic marketing planning
- > Marketing budget development
- > Assisting with advertising and promotion
- > Marketing for business profitability and growth

Business Intelligence

- > Feasibility studies
- > Market research for small to medium businesses
- > Policy analysis and evaluation
- > Survey research
- > Public opinion polling/organisational profiling

Training

- > Business Management skills
- > Taxation and technical topics
- > Accounting for non-accountants
- > Financial management skills

CONTACT DETAILS

Christchurch office

Partners: Frank Burgess, Taxation; Geoff Bolderston, Business Services; Phillip Roth, Business Services, Consulting; Michael Rondel, Audit & Assurance, Consulting; Noel Walton, Business Services; Frazer Weir, Business Services.

Director: Rhodes Donald, Wealth Management.

Associate: Brian Clarke, Taxation.

Dunedin office

Partners: Stephen Higgs, Business Services; Graham Crombie, Audit & Assurance, Consulting; Tim Dunn, Business Services; Phil Broughton, Business Services, Training; Steve Dunbar, Business Services, Insolvency; Michael Turner, Taxation; Henry van Dyk, Business Services.

Director: Rhodes Donald, Wealth Management.

Associate: Carole Greer, Audit & Assurance.